



Portal user guide – Update client details

Clients' details may be updated in the portal as required, this can include personal information, communication preferences and if they have passed away.

Access

What access do I need?

SP Site or SP Claims

What else do I need?

You must be linked to the client in the portal.

Client details

Step 1

From the landing page of the portal, open the Client tab and search for the client.

Apply for Program	
Find a client	or applicant
Eligibility Type	Please Select
Eligibility Number/ Voucher Number	Voucher number, Centrelink, DVA, ADF, JSID nu
Given Name	
Family Name	
Date of Birth	Day 🗸 Month 🗸 Year 🗸
Site ID	This is the site id number
	More search options
	Find Q Clear

Opening the client's page will bring up the client details screen.

Step 2

The client's current details are at the top of the screen. Click **Edit** to update any of the following client's details

- Name
- Date of birth
- Gender
- Title
- Contact number
- Address
- Specialist services (please see the '<u>update a client to specialist services</u>' guide)

Eligibility	Card (PCC)	elink Pension
Title	Mrs	
Given Name*		
Family Name*		
Date of Birth*	2 • S	iep 🔻
Gender*	Female	
Contact Phone 1	Home •	01222233
Contact Phone 2	Please Selec •	
Email		
Save Cance	1	

If you have updated the client's address you will need to click Check address and confirm the correct address.

Click Save.

Updating communication preferences Step 1

Under the Client Communications tab, Click Edit to update any of the following details:

- mark if the client lives in an aged care facility
- add an alternative contact
- update the client's correspondence preferences
- add an email address

Step 2

If your client would like to nominate an alternative contact, please check the box next to 'Does the client have an alternative contact'. You will need to enter in the alternative contact's details.

You can choose whether to send information to the client only, the alternate contact only, or to both.

Details
Please Select 🗸
Please enter given name
Please enter family name
Please Select 🗸
Please Select 🗸
•references only to the client
only to their alternate contact
to the client and their alternate contact
 to the client and their alternate contact via Email via Post
 to the client and their alternate contact via Email via Post

Step 3

You can also add an email address for the client by selecting Send correspondence to the client to via Email.

Resides in an aged care facility?	Ves Yes
Does the client have an alternate contact?	Yes
Correspondence I	Preferences
Send correspondence to the client*	● via Email via Post
Email Address*	name@internetprovider.com
Confirm Email Address*	name@internetprovider.com

Step 4

If the client prefers correspondence by post, you can also specify a different postal address for the client, if relevant. To do so, untick the Postal Address same as residential box and fill in the details. Click **Check address** and confirm the correct address.

Click Save.

Send correspondence to the client*	🔵 via Email 💿 via Post	
Postal Address same as residential	Yes	
Address 1*		
Address 2		
Suburb*		
State*	Please Select	~
Postcode*		
Address checker		
We need process	l to check your address so we can your application quickly.	
Check address		

Deceased clients

Step 1

If your client has passed away, you need to update the portal.

Open the Change Client Status tab.

Click Edit, and in the drop down Action menu choose 'Cancel- deceased'.

Action*	Cancel - deceased
Reason For Action*	Please enter a description of the reason fo action
Date*	Day Month Year
	Save

You will need to add a Reason For Action, such as "client's family advised" and today's date.

Click Save.